

ADMINISTRATIVE - INTERNAL USE ONLY

1 December 1975

OFFICE OF PERSONNEL MEMORANDUM NO. 20-3-21

SUBJECT: Policies and Procedures for the Management of Clerical
Careerists - Personnel Career Sub-Group

A. POLICY

It is the policy of the Personnel Career Sub-Group that those Careerists under the jurisdiction of the Clerical Panel, GS-03 through GS-06, and certain employees GS-07 and above, be evaluated semi-annually. On the basis of this evaluation process, employees will be placed in comparative evaluation groupings. The employee's standing in these groupings will be considered in determining promotions, assignments, training, counseling and development. These groupings are as follows:

HIGHEST POTENTIAL (HP)

Employees whose experience, qualifications and excellent performance in assignments and training indicate that they have the highest potential for advancement. Career actions should utilize and further develop this potential.

MAY DEVELOP HIGH POTENTIAL (MD)

Employees whose qualifications and performance clearly are above average and who give indication that they later may demonstrate high potential for greater responsibility. Career actions (assignment, training, experience on the job) should enhance their skills and develop this potential.

VALUABLE CONTRIBUTION (VC)

Employees whose performance is good and who generally are realizing their potential. This category will include some employees who may be capable of performing at a higher level of responsibility and some who may not. Among those who may not are employees who are making a vital contribution to the functioning of their office (above average or satisfactory performance) and would continue to do so either in their present or a rotational assignment. Career management for employees in this grouping should provide sufficient opportunities for work satisfaction, improvement of skills, and personal growth at current levels of responsibility so that those who may have future potential have an opportunity to demonstrate it.

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LIMITED POTENTIAL (LP)

Employees whose overall performance is adequate but who have some characteristic affecting knowledge or performance such that their potential is judged to be limited. Their career planning and counseling should consider whether there are measures which reasonably can be taken to assist them in overcoming such deficiencies, whether their talents can be utilized better in some other function or office, or whether they should be encouraged to seek career opportunities elsewhere.

SUBSTANDARD (SS)

Employees whose performance and potential are substandard in comparison with others of the same grade and occupational category. Requisite administrative actions may include, dependent on the procedures of the Career Service, notification, counseling, training and/or reassignment. Employees in this grouping are subject to down/grading or separation under the procedures specified by Agency regulations and the Career Service. In a surplus situation, employees so evaluated would have low priority for retention.

B. EVALUATION INSTRUCTIONS

Each section of the attached evaluation worksheet identifies a specific dimension of the Careerist. There will be distinct differences among Careerists in their levels of performance, knowledge and skills, abilities, production, attitude and potential. The evaluation system establishes a point range for each item.

To achieve an objective evaluation, the attached worksheet will be used by the evaluating officer. The official personnel file and other relevant information will be used during the evaluation process. The Panel will meet and reach a consensus on the comparative evaluation groupings by grade, which will be submitted to the Director of Personnel for approval.

The comparative evaluation grouping will be used in approving recommendations for promotion.

C. ORIENTATION

The Panel will hold periodic orientation sessions for clerical employees with less than one year in the MP Career Sub-Group. These sessions will be designed to acquaint attendees with the assigned responsibilities, functions and policies of the Office of Personnel.

D. COUNSELING

The Clerical Panel will ensure that each Careerist under its jurisdiction will initially be interviewed four months after EOD with OP and counseled annually thereafter. Each employee will be afforded the opportunity for counseling at any time with the Career Management Officer or any of the Panel members he/she so desires.

E. TRAINING

All clerical employees will be given the opportunity to participate in appropriate training.

1. Office of Personnel Training:

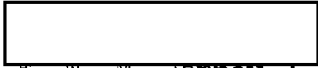
"Skills Sessions" for clerical employees will be developed by the Panel. These sessions will relate to OP functions and other topics of special interest. Attendance at these sessions will be recorded in the employees' soft files.

2. Other Agency Training:

All clerical employees will be afforded the opportunity to take Agency courses such as Admin Procedures, CIA Today and Tomorrow, Effective Writing Workshop, Employee Development, and EDP Orientation.

3. External Training:

External training will be administered on an individual basis using already established procedures as set forth in OPN 20-73-8, dated 27 September 1973.


F. W. M. Janney
Director of Personnel

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Attachment: Clerical Evaluation Sheet

OPM 8-75

PERSONNEL CAREER SUB-GROUP
CLERICAL EVALUATION SHEET

TOTAL POINTS: _____

NAME: _____
POSITION TITLE: _____
POSITION GRADE: _____
SUPERVISOR: _____
(Name & Title)

OFFICE: _____
DATE OF GRADE: _____
EMPLOYEE TITLE: _____
EMPLOYEE GRADE: _____

FACTORS	Outstanding	Strong	Proficient	Marginal	Unsatisfactory
	11-13	8-10	4-7	1-3	0
I. <u>PERFORMANCE</u> The degree to which an individual effectively performs his/her current duties.					
II. <u>KNOWLEDGE & SKILLS</u>					
1. <u>Applied Skills</u> : The degree to which an individual masters and utilizes the knowledge and skills required to perform his/her job.					
2. <u>Policies & Procedures</u> : The degree to which an individual understands and applies the policies and procedures of his/her immediate office.					
3. <u>Knowledge of Organization</u> : The degree to which an individual is aware of the functions and structure of his/her office.					
SUB-TOTAL					

FACTORS	Outstanding	Strong	Proficient	Marginal	Unsatisfactory
III. <u>ABILITIES</u>	11-13	8-10	4-7	1-3	0
1. <u>Adaptability</u> : The degree to which an individual works under pressure and adjusts to changes.					
2. <u>Follows Instructions & Guides</u> : The degree to which an individual follows instructions and guides and seeks advice and/or direction, when necessary.					
3. <u>Communication</u> : The degree to which an individual effectively expresses himself/herself in job-related matters.					
IV. <u>PRODUCTION</u>					
1. <u>Efficiency</u> : The degree to which an individual effectively organizes his/her work and time.					
2. <u>Neatness & Accuracy</u> : The degree to which an individual neatly and accurately completes his/her work.					
3. <u>Meets Deadlines</u> : The degree to which an individual completes his/her work on a timely basis.					
4. <u>Preparation & Maintenance of Records</u> : The degree to which an individual effectively prepares and maintains records, such as reports, files, forms, logs, statistics, correspondence, etc.					
SUB-TOTAL					

<u>FACTORS</u>	Outstanding	Strong	Proficient	Marginal	Unsatisfactory
V. <u>ATTITUDE</u>	11-13	8-10	4-7	1-3	0
1. <u>Interest in Job</u> : The degree to which an individual displays interest towards achieving the objectives of his/her position.					
2. <u>Accepts Additional Responsibilities</u> : The degree to which an individual willingly accepts additional responsibilities and assists others.					
3. <u>Cooperation with Others</u> : The degree to which an individual works successfully with others and contributes to the team effort.					
VI. <u>POTENTIAL</u> The degree to which an individual can be expected to assume increased responsibilities.					
a. <u>Within clerical range.</u>					
b. <u>Above clerical range.</u>					
SUB-TOTAL					
<u>TOTAL POINTS</u>					

RATINGS

Outstanding : Superior to peers.
 Strong : Exceptional proficiency.
 Proficient : Satisfactory/average.
 Marginal : Deficient in some aspects.
 Unsatisfactory: Unacceptable.